

# **INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE**

## **WORKSHEET III Repair and Renovations**

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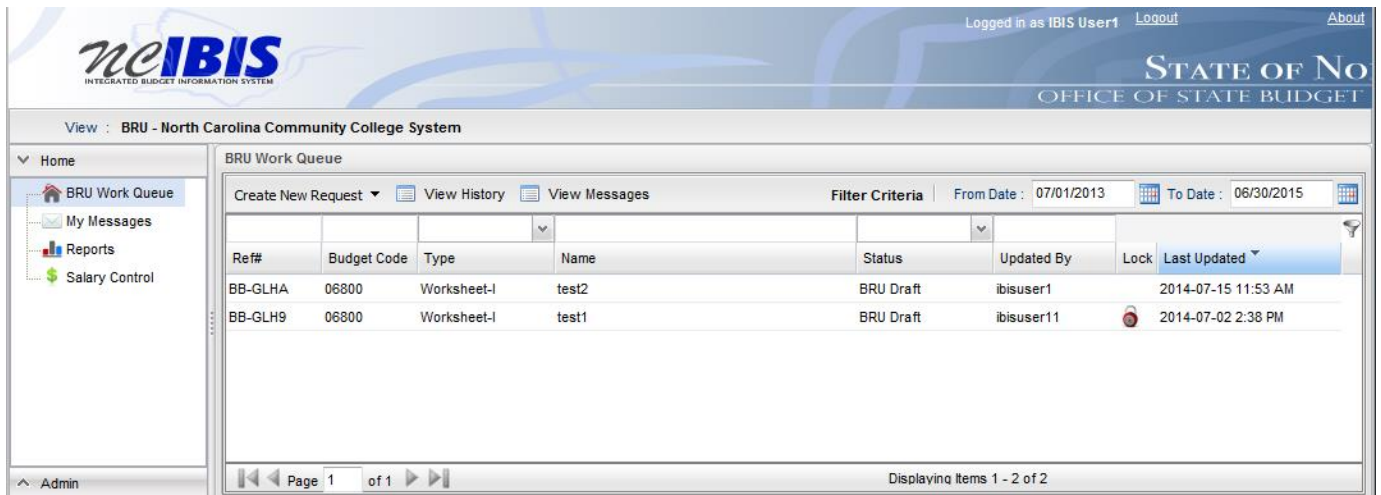
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## PREFACE

This training guide describes how to use IBIS to complete a Repair and Renovations Worksheet III form. For policy guidance, please consult instructions for preparation of the Governor's recommended budget that are published before each budget cycle on OSBM's website.

## WORKSHEET III - Repair and Renovations

Once you have successfully logged into IBIS, you should see the Work Queue page similar to what is shown below. This could be a BRU, Agency or OSBM Work Queue page depending on your log-in credentials.

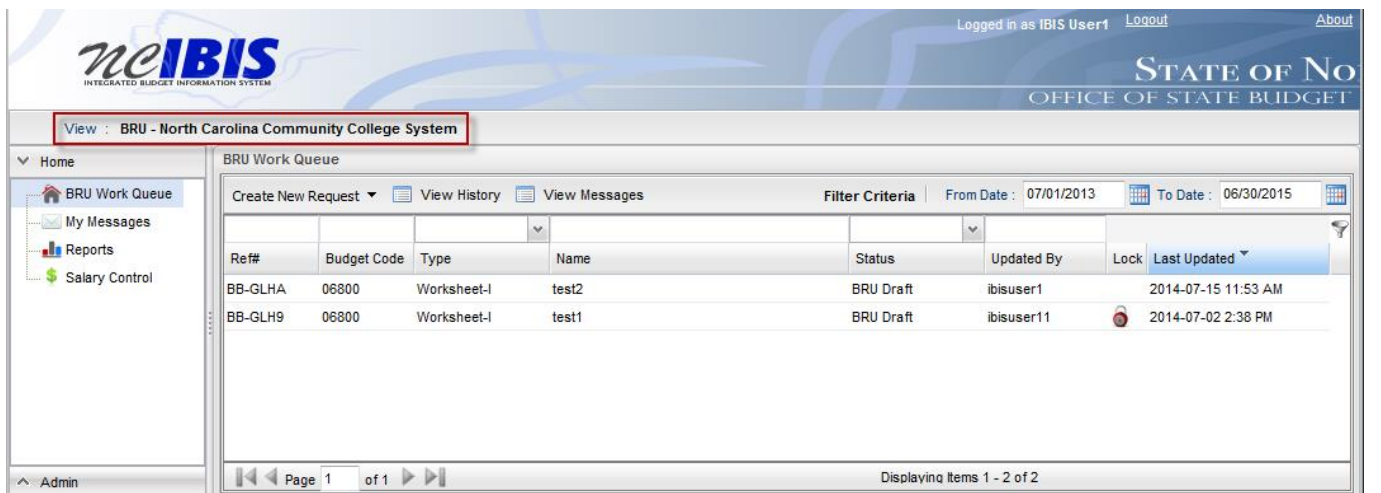


View : BRU - North Carolina Community College System

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-GLHA	06800	Worksheet-I	test2	BRU Draft	ibisuser1		2014-07-15 11:53 AM
BB-GLH9	06800	Worksheet-I	test1	BRU Draft	ibisuser11		2014-07-02 2:38 PM

Page 1 of 1  
Displaying Items 1 - 2 of 2

Find the View indicator in the upper left-hand corner of the page. The field should contain only your BRU, Agency or OSBM. If you have access to multiple departments and/or agencies, these will appear in a drop-down list in this field. In the example below, the user is logged in as the North Carolina Community College System.



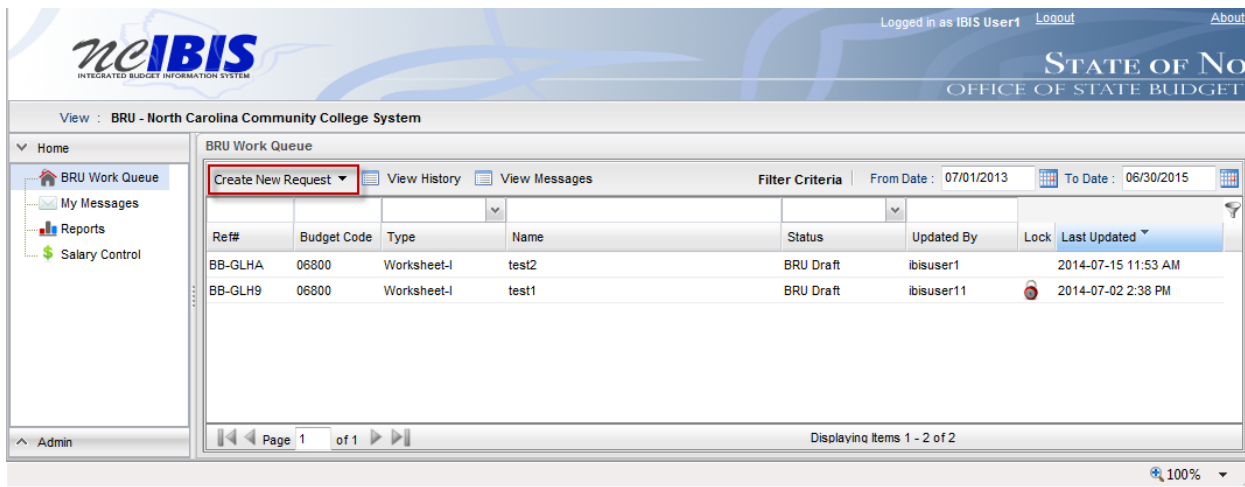
View : BRU - North Carolina Community College System

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-GLHA	06800	Worksheet-I	test2	BRU Draft	ibisuser1		2014-07-15 11:53 AM
BB-GLH9	06800	Worksheet-I	test1	BRU Draft	ibisuser11		2014-07-02 2:38 PM

Page 1 of 1  
Displaying Items 1 - 2 of 2

## Create a New Worksheet III

To create a new Worksheet III form, click on the **Create New Request** dropdown list.



View : BRU - North Carolina Community College System

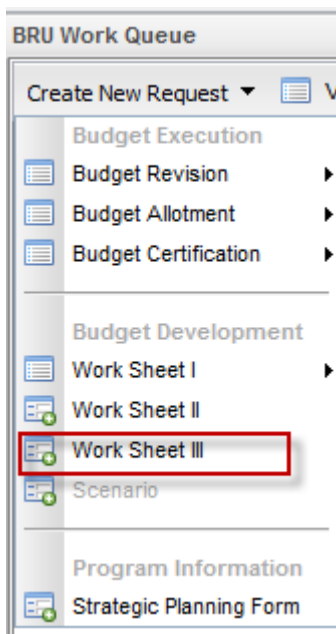
BRU Work Queue

Create New Request View History View Messages Filter Criteria From Date : 07/01/2013 To Date : 06/30/2015

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-GLHA	06800	Worksheet-I	test2	BRU Draft	ibisuser1		2014-07-15 11:53 AM
BB-GLH9	06800	Worksheet-I	test1	BRU Draft	ibisuser11		2014-07-02 2:38 PM

Page 1 of 1 Displaying Items 1 - 2 of 2

When you click on 'Create New Request', the drop-down will display the following options as shown below. Click on the "Worksheet III" option.

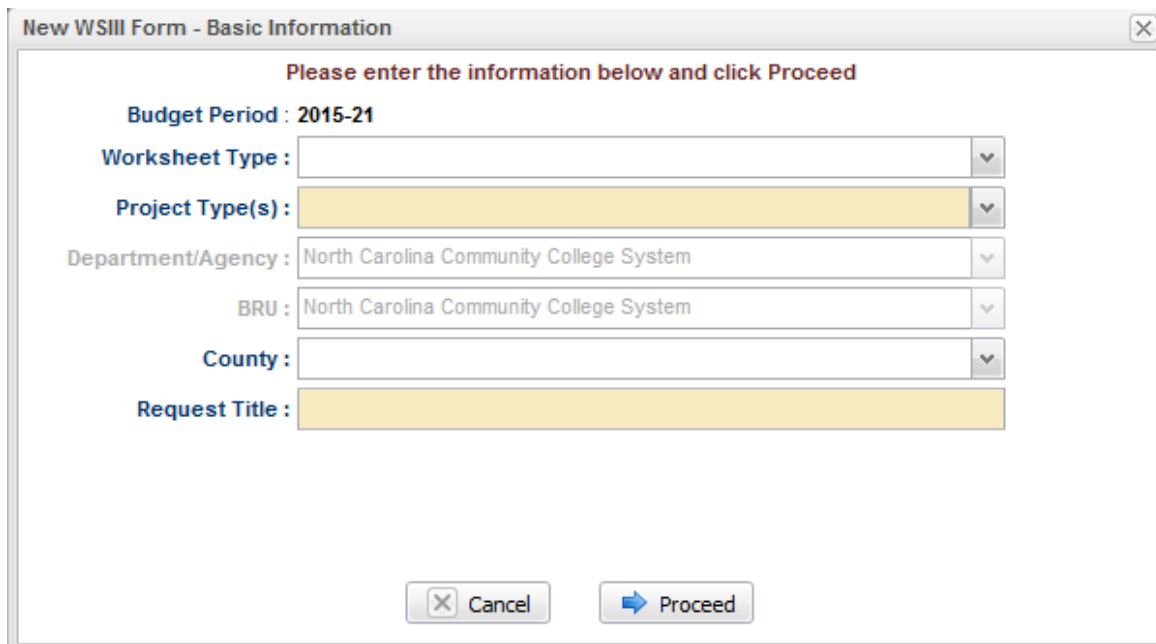


BRU Work Queue

Create New Request

- Budget Execution
  - Budget Revision
  - Budget Allotment
  - Budget Certification
- Budget Development
  - Work Sheet I
  - Work Sheet II
  - Work Sheet III**
  - Scenario
- Program Information
- Strategic Planning Form

Once you click the Worksheet III option, a New WSIII Form – Basic Information window appears as shown in the following screenshot.



**New WSIII Form - Basic Information**

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type :

Project Type(s) :

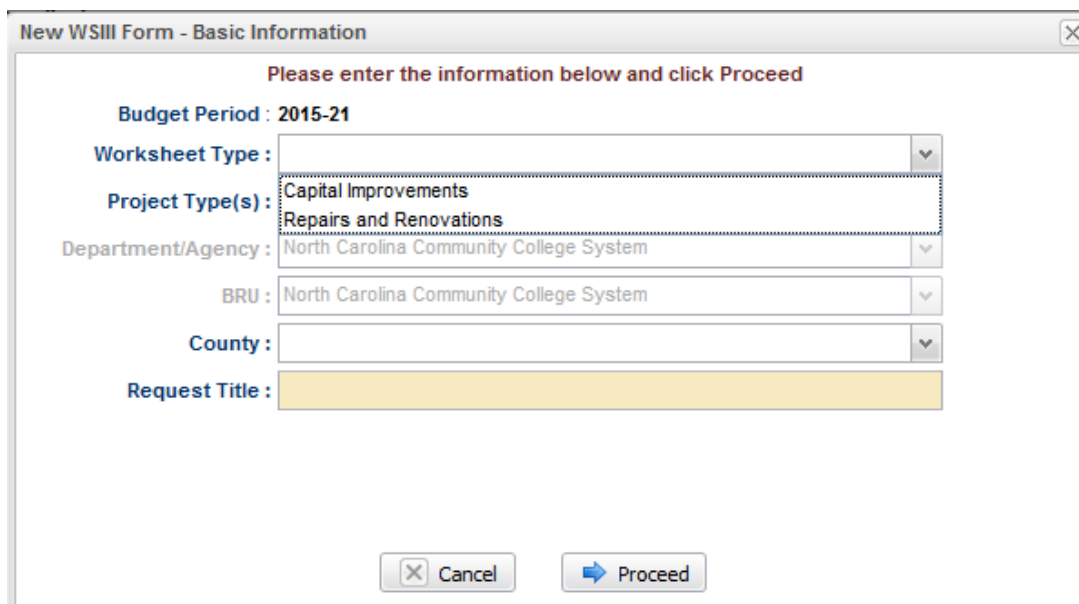
Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

County :

Request Title :

You will need to complete the basic information. The 6-year budget period is set for you. The second option is to select the Worksheet Type. Click on the dropdown arrow and you will see Capital Improvements and Repairs and Renovations options; then select Repairs and Renovations. Once you select an option the list will disappear and your selection will be displayed in the field.



**New WSIII Form - Basic Information**

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type :

Project Type(s) :

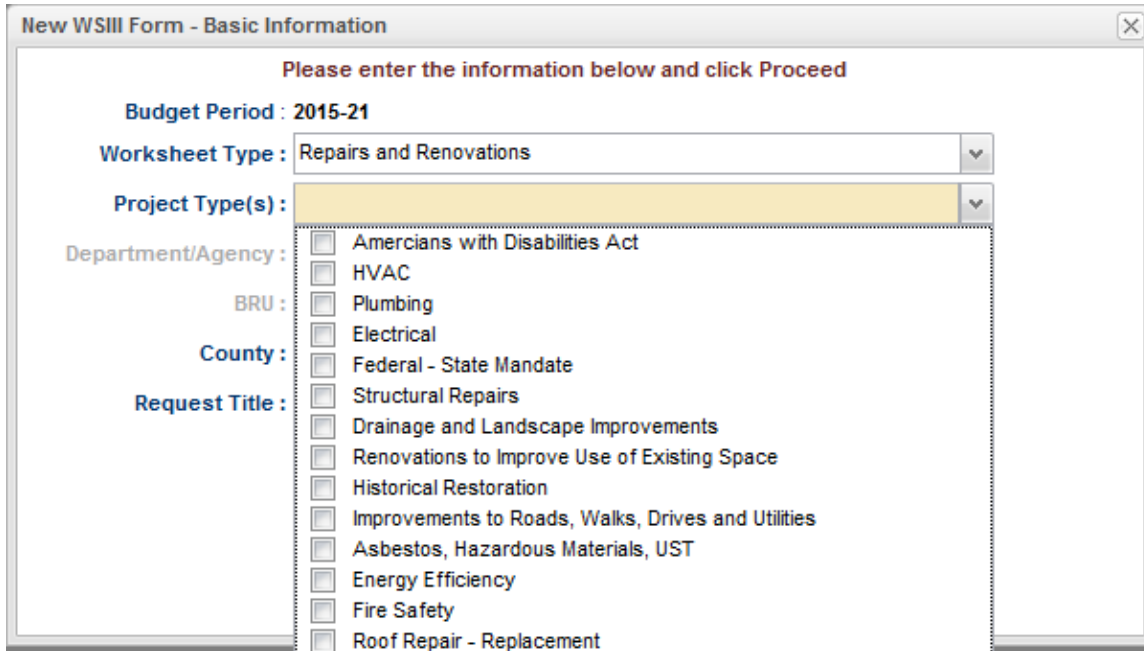
Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

County :

Request Title :

The third field allows the selection of **Project Type(s)**. Select the categories that best describe the requested project. When you are finished making your selection(s), click your mouse pointer anywhere outside the selection box, or press your Tab button to move to the next field.



**New WSIII Form - Basic Information**

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type : Repairs and Renovations

Project Type(s) :

Department/Agency :

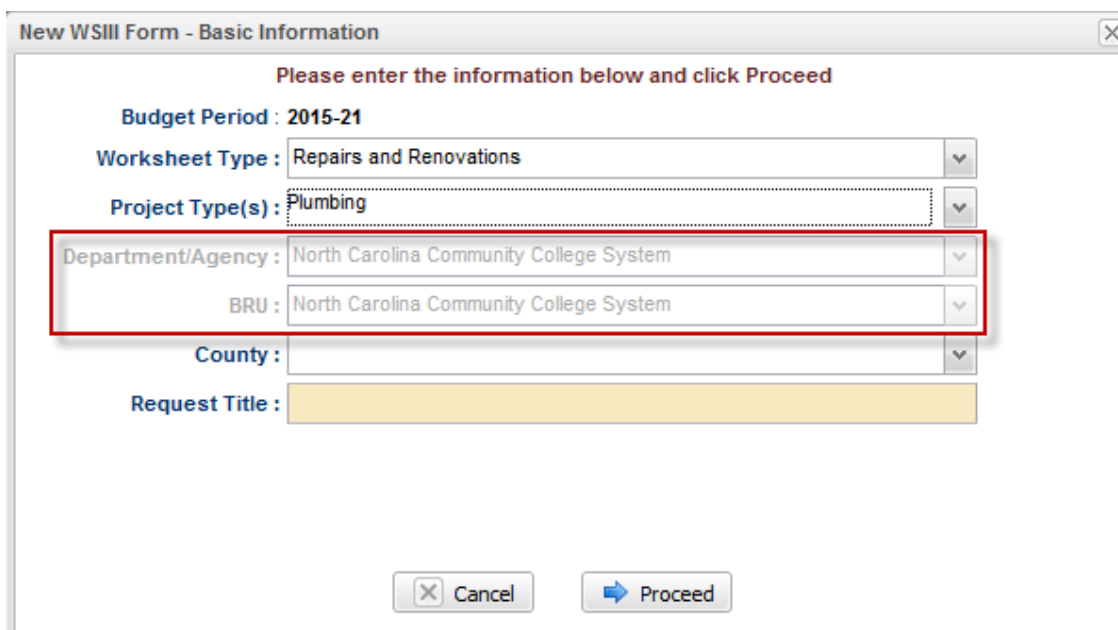
BRU :

County :

Request Title :

- ☐ Americans with Disabilities Act
- ☐ HVAC
- ☐ Plumbing
- ☐ Electrical
- ☐ Federal - State Mandate
- ☐ Structural Repairs
- ☐ Drainage and Landscape Improvements
- ☐ Renovations to Improve Use of Existing Space
- ☐ Historical Restoration
- ☐ Improvements to Roads, Walks, Drives and Utilities
- ☐ Asbestos, Hazardous Materials, UST
- ☐ Energy Efficiency
- ☐ Fire Safety
- ☐ Roof Repair - Replacement

Note the next two fields are labeled **Department/Agency** and **BRU**. In most cases, access is restricted to a single department/agency so it will default to your Department/Agency and BRU. If a user has access to multiple departments/agencies and BRUs, a dropdown option will appear for selection.



**New WSIII Form - Basic Information**

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type : Repairs and Renovations

Project Type(s) : Plumbing

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

County :

Request Title :

Cancel Proceed

Select from the drop down menu the **county** in which the requested project is located; or select either “Statewide” or “Multiple” if appropriate.

New WSIII Form - Basic Information

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type : Repairs and Renovations

Project Type(s) : Plumbing

Department/Agency : North Carolina Community College System

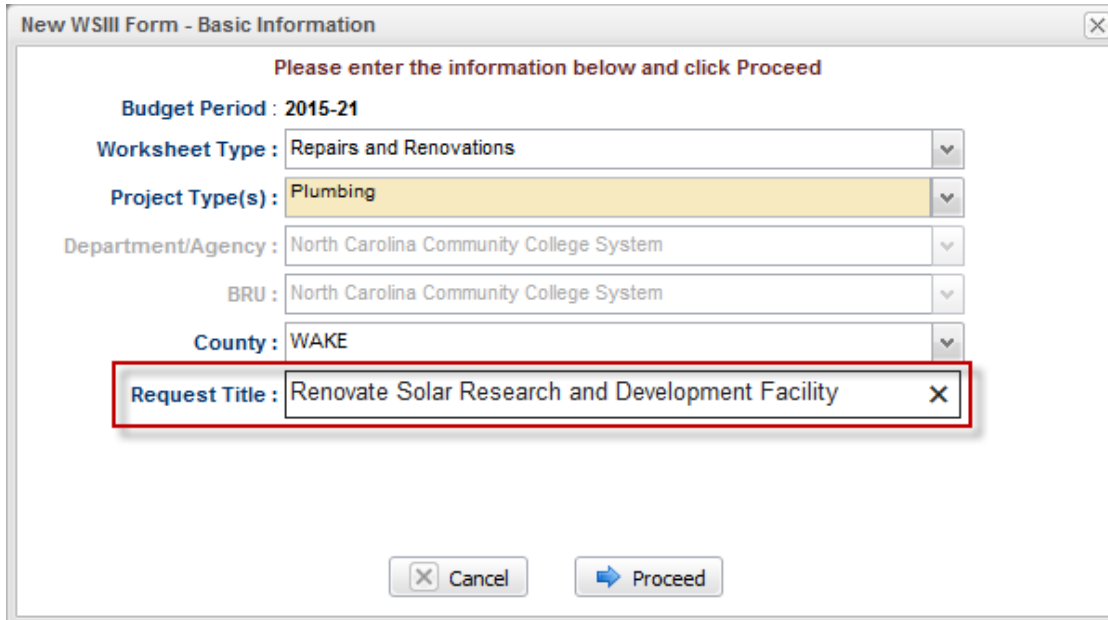
BRU : North Carolina Community College System

County :

Request Title :

STANLY  
STOKES  
SURRY  
SWAIN  
TRANSYLVANIA  
TYRRELL  
UNION  
VANCE  
WAKE  
WARREN  
WASHINGTON  
WATAUGA  
WAYNE  
WILKES  
WILSON  
YADKIN  
YANCEY  
Statewide  
Multiple

Enter a descriptive **title** of the requested project. If the request is for multiple facilities across the state, please include this in the title. Please note there is a 255 character limit for this field. Where possible, please do not use acronyms.



New WSIII Form - Basic Information

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type : Repairs and Renovations

Project Type(s) : Plumbing


Department/Agency : North Carolina Community College System

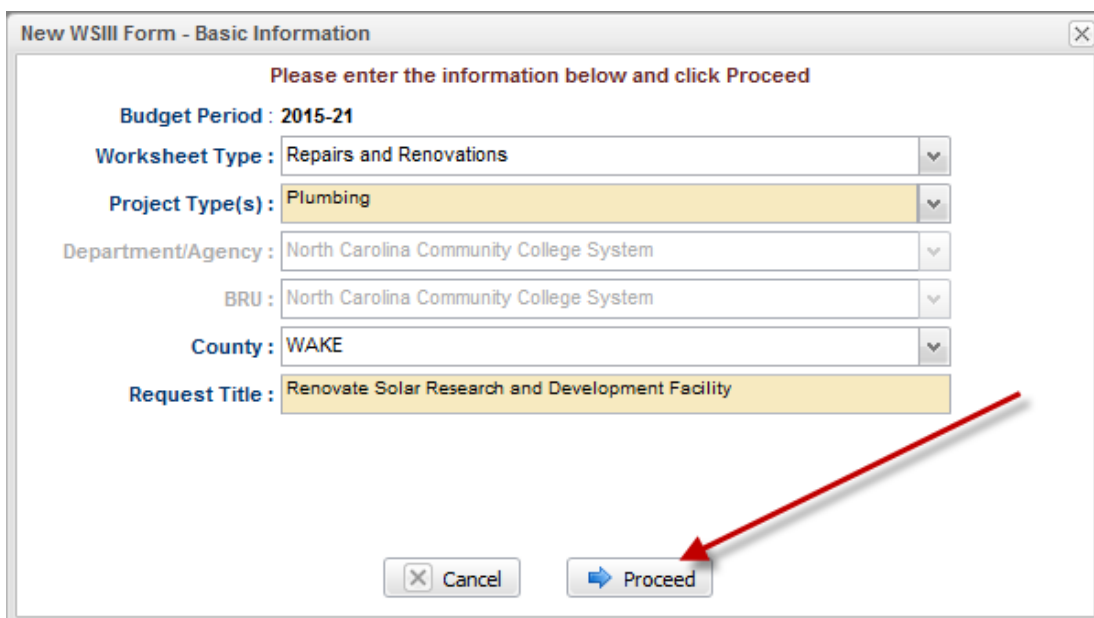
BRU : North Carolina Community College System

County : WAKE

Request Title : Renovate Solar Research and Development Facility

Cancel Proceed

Clicking on the Cancel button  will close the window. Nothing will be saved and the Work Queue will reappear. If all entries are satisfactory and there is no need to cancel the form, bypass this step. Click on the **Proceed** button as shown below.



New WSIII Form - Basic Information

Please enter the information below and click Proceed

Budget Period : 2015-21

Worksheet Type : Repairs and Renovations

Project Type(s) : Plumbing

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

County : WAKE

Request Title : Renovate Solar Research and Development Facility

Cancel Proceed



Once Proceed is clicked, a Worksheet III - Repair and Renovations form will open as shown below. The form's three tabs (**Basic Information**, **Request Detail** and **Attachments**) will appear in the upper left corner of the screen. To navigate to any of the tabs simply click on the appropriate tab title and that tabs data will appear.

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

Status: BRU Draft

UnLock Form

Basic Information Request Detail Attachments

Budget Period : 2015-21  
Priority :  ?  
Worksheet Type : Repairs and Renovations  
Project Type : Plumbing  
Department/Agency : North Carolina Community College System  
BRU : North Carolina Community College System  
Division/Institution : Not Applicable  
County : WAKE  
Title : Renovate Solar Research and Development Facility ?

Screen ID : WSIII-0  
IBIS ID : G05A

### General Information

Is this request funded from 100% NGF? : ☐ Yes ☒ No  
Has facility been inspected by the State Construction Offices FCAP team? : ☐ Yes ☐ No

Insured value of building(s) : \$0.00  
Age of building(s) :

**Named Attachments:**

? OC-25 Cost Estimate +  
? FCAP Report +

Project Description and Justification: Include short description of type, nature and extent of work required, the need for the project, and expected

**B** /

Export PDF Save Draft Save & Close Ready To Submit Delete Request

## BASIC INFORMATION TAB

### Basic Information

The Basic Information screen comes to the forefront since it is the default tab when creating a new or opening an existing form.

The information on the basic information tab is largely carried forward from the initialization screen when the form was first created, which includes the following non-editable fields – budget period, worksheet type, project type, department/agency, BRU, and county.

Enter the Department **priority** for the specific request; it is a required field. IBIS will not allow duplicate priorities. For example, IBIS will only allow a department to have one priority identified as #1 for each type of request (i.e., Capital Improvements and Repairs and Renovations).

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

Status: BRU Draft

Basic Information Request Detail Attachments

Budget Period : 2015-21

Priority :  ?

Worksheet Type : Repairs and Renovations

Project Type : Plumbing

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

Division/Institution : Not Applicable

County : WAKE

Title : Renovate Solar Research and Development Facility ?

### General Information

Is this request funded from 100% NGF? : ☐ Yes ☒ No

Has facility been inspected by the State Construction Offices FCAP team? : ☐ Yes ☐ No

The **Division/Institution** field may be grayed out for agencies to which it does not apply. The Division may be selected from the drop-down box if it is appropriate for the agency making the request. It is used for reference purposes only and does not have a bearing on budgeting.

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

Status: BRU Draft

Basic Information Request Detail Attachments

Budget Period : 2015-21

Priority : 3 ?

Worksheet Type : Repairs and Renovations

Project Type : Plumbing

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

Division/Institution : Not Applicable

County : WAKE

Title : Renovate Solar Research and Development Facility ?

The **title** entered upon creation of the form will be pre-populated in this field. You may edit this field at any time the form is editable within the IBIS workflow.

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

Status: BRU Draft

Basic Information Request Detail Attachments

Budget Period : 2015-21

Priority : 3 ?

Worksheet Type : Repairs and Renovations

Project Type : Plumbing

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

Division/Institution : Not Applicable

County : WAKE

Title : Renovate Solar Research and Development Facility ?

## General Information

The general information section on the basic information tab contains several key questions related to the construction project.

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

Status: BRU Draft

UnLock Form

Basic Information Request Detail Attachments

Budget Period : 2015-21  
Priority : 3 ?  
Worksheet Type : Repairs and Renovations  
Project Type : Plumbing  
Department/Agency : North Carolina Community College System  
BRU : North Carolina Community College System  
Division/Institution : Not Applicable  
County : WAKE  
Title : Renovate Solar Research and Development Facility ?

Screen ID : WSIII-0  
IBIS ID : G05A

**General Information**

Is this request funded from 100% NGF? : ☐ Yes ☒ No  
Has facility been inspected by the State Construction Offices FCAP team? : ☐ Yes ☐ No  
Insured value of building(s) : \$0.00  
Age of building(s) :

**Named Attachments:**

OC-25 Cost Estimate  
FCAP Report

Project Description and Justification: Include short description of type, nature and extent of work required, the need for the project, and

1 111

Export PDF Save Draft Save & Close Ready To Submit Delete Request

- **Is this request funded from 100% NGF?**  
This field is automatically populated to “No”. Please select “Yes” if appropriate.

- **Has facility been inspected by the State Construction Offices FCAP team?**

This field is not initially populated but is mandatory. Selecting “Yes” results in the form displaying the following data collection controls:

### General Information

Is this request funded from 100% NGF? : ☐ Yes ☒ No

Has facility been inspected by the State Construction Offices FCAP team? : ☒ Yes ☐ No

Was the requested project included in their review? : ☐ Yes ☒ No

What is the total value of FCAP deficiencies? :

Insured value of building(s) :

Age of building(s) :

Answering “Yes” to the question “*Was the requested project included in their review?*” requires the attachment of a Facility Condition Assessment Program (FCAP) Report.

- **What is the total value of FCAP deficiencies?**

Enter the total value of deficiencies for the building as reported by FCAP.


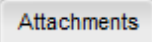
- **Insured value of building(s)?**

Enter the insured value of the building(s) affected by the repair or renovation.



- **Age of building(s)?**



Enter the age of the building affected by the repair and renovation. **If multiple buildings of different ages are affected, please leave this field blank.**

## Named Attachments

The next portion of the general information section is Named Attachments. Clicking the green icon  to the right of any of the attachment icons allows you to browse and select a file to attach to the request. Please note all named attachments will be listed and viewable from the Attachments tab  at the top of the form.

### Named Attachments:

 OC-25 Cost Estimate 

 FCAP Report 

- **OC-25 Cost Estimate**

The OC-25 Cost Estimate is a mandatory attachment

- **FCAP Report**

The ability to attach an FCAP Report is disabled unless you answer “Yes” to “***Was the requested project included in their review?***”

### General Information

Is this request funded from 100% NGF? : ☐ Yes ☒ No

Has facility been inspected by the State Construction Offices FCAP team? : ☒ Yes ☐ No

Was the requested project included in their review? : ☒ Yes ☐ No

What is the total value of FCAP deficiencies? :

Insured value of building(s) :

Age of building(s) :


Once answer is “Yes”, the ability to attach an FCAP Report is enabled and is now mandatory.

**Named Attachments:**

?	OC-25 Cost Estimate	+
?	FCAP Report	+



**Delete a Named Attachment**

To delete a named attachment, click on the delete attachments icon  next to the name of the attachment you want to delete.


**Named Attachments:**

?	OC-25 Cost Estimate	-	OC-25_Cost_Estimate_Research_Facility.xlsx
?	FCAP Report	-	FCAP Report.pdf



Once you click on the delete attachment icon, you will be presented with a confirm message as shown below. Click “OK” to delete the attachment or “Cancel” to cancel the deletion.

Confirm



Are you sure you want to remove this attachment?

OK

Cancel

The last portion of the Basic Information section of the report is the mandatory **Project Description and Justification**. Please summarize the need for the project and the expected impact. Text can also be copied and pasted in this field from other applications such as Microsoft Word, which will preserve formatting from that application.

Project Description and Justification: Include short description of type, nature and extent of work required, the need for the project, and expected



## REQUEST DETAIL TAB

### Request Detail

Click on the Request Detail tab at the top of the form to bring it to the forefront.

WS III - Repairs and Renovations: ( Title:Renovate Solar Research and Development Facility BRU:North Carolina Community College System )

UnLock Form

Status: BRU Draft

Basic Information **Request Detail** Attachments

Screen ID : WSIII-1  
IBIS ID : G05A

**Requirements** ?

Edit Row Cancel Edit

Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Update
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

**Receipts** ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	

No items to show.

**Summary**

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total
Total Requirements	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Receipts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Appropriation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**Estimated Project Schedule (dates):**

Begin Design :  Begin Construction :  Completion :  Occupancy :

Does the requested project impact the operating budget? : ☐ Yes ☐ No

If yes, describe:

Export PDF Save Draft Save & Close Ready To Submit Delete Request

## REQUIREMENTS

The first section is for Requirements. This section has both an Edit Row button and a Cancel Edit button as shown below. Both buttons can only be utilized once rows have been created

### Requirements?

Edit Row

Cancel Edit

## Add Requirements

Requirements for the request must be aggregated to a single line for entry, therefore, there is only one requirement line allowed and it is prepopulated with zeros. To add a row of data, click on the single row of data as highlighted below.

### Requirements?

Edit Row

Cancel Edit

Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Update
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Then click **Edit Row**.

### Requirements?

Edit Row

Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Update
Description	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	Total	
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Once Edit Row is clicked, you will see the contents of that single row populate the editable section at the top of the grid. Also notice the Cancel Edit and Update buttons have been enabled and no longer greyed out. This indicates you will be able to update the row once you've completed entering data, or you may cancel the edit if you wish.

**Requirements?**

Edit Row Cancel Edit Update

0	0	0	0	0	0		
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

To enter requirements, click into each column of the requirements row to enter a dollar amount for each year of the 6-year capital planning period. Remember to either click the "x" in the fields to remove its previous contents, or take your mouse and highlight the data and overwrite it with new data.

**Requirements?**

Edit Row Cancel Edit

10500	x	0	0	0
2015-16	2016-17	2017-18		
\$0.00	\$0.00	\$0.00		

Once you are finished entering data for the requirement, press the **Update** button.

**Requirements?**

Edit Row Cancel Edit Update

10500	10500	10500	10500	10500	10500	x	
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

The requirement data will then populate the requirements table and the summary table as shown below.

**Requirements?**

Edit Row	Cancel Edit								
Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt			Add	
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total			
\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$63,000.00			

**Receipts?**

Edit Row	Remove Row(s)	Cancel Edit							
Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add	
Description	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total		
No items to show.									

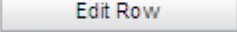
Summary								
	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
<b>Total Requirements</b>	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$63,000.00	
<b>Total Receipts</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Appropriation</b>	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$63,000.00	

**Edit a Row**

To edit a row that has been entered, click on the row to highlight it.

**Requirements?**

Edit Row	Cancel Edit								
Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt			Add	
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total			
\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$63,000.00			

Click on the Edit Row button  and the data in the selected row will populate the Edit/Add row line at the top of the grid as show below. Note: You can also double click the row and it will populate the Edit/Add row line.

**Requirements?**

Edit Row Cancel Edit

10500	10500	10500	10500	10500	10500		Update
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$63,000.00	

Once you are finished making your edits, click the Update button.

**Requirements?**

Edit Row Cancel Edit

10500	10500	10500	10500	10500	99500 x		Update
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$99,500.00	\$99,500.00	\$99,500.00	\$99,500.00	\$99,500.00	\$99,500.00	\$597,000.00	

## Cancel an Edit

While editing, if you decide to cancel, press the Cancel Edit button.

**Requirements?**

Edit Row **Cancel Edit**

10500	10500	10500	10500	10500	10500 x		Update
2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$99,500.00	\$152,000.00	

## RECEIPTS

The next section of the Request Detail tab is for Receipts. It has three buttons: Edit Row, Remove Row(s) and Cancel Edit. Both the Edit Row and Remove Row(s) buttons can only be utilized once rows have been created.

**Receipts**

Edit Row Remove Row(s) Cancel Edit

## Add Receipts

The data entry row highlighted below is used to add a row to the receipts table. Multiple receipts can be entered.

**Receipts** ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
No items to show.								

Click on each column of the row to enter a receipt dollar amount for each year of the 6-year capital planning period. When finished, click the Add button.

**Receipts** ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total	
No items to show.								

Once the Add button is clicked, the receipts data will be added to the receipts table, clearing the fields in the data entry grid for entry of another row. Add as many rows of receipts as appropriate to complete the Worksheet III form.

**Receipts** ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description ^ 1	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total ^ 2	
	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$30,000.00	

data entry grid

receipts table

Notice the receipts data populates the summary table as shown below.

**Summary**

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total
Total Requirements	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$10,500.00	\$99,500.00	\$152,000.00
Total Receipts	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$30,000.00
Appropriation	\$5,500.00	\$5,500.00	\$5,500.00	\$5,500.00	\$5,500.00	\$94,500.00	\$122,000.00

### Estimated Project Schedule

Enter the key project dates related to the project's projected begin and end dates by clicking on the calendar icon to select the appropriate dates. All four project schedule fields are mandatory.

**Estimated Project Schedule (dates):**

Begin Design :   Begin Construction :   Completion :   Occupancy :  

- **Begin Design** - Enter the date that design work is projected to begin or started if the project received advance planning.
- **Begin Construction** - Enter the date that construction is projected to begin.
- **Completion** - Enter the date that construction is projected to be complete.
- **Occupancy** - Enter the date that is projected for occupancy (leave blank if project does not involve occupancy).

### Impact to Operating Budget

This question is mandatory and must be answered in order to submit the Worksheet III. When answered "Yes", you must enter a description in the space provided as shown below:

Does the requested project impact the operating budget? : ☒ Yes ☐ No

If yes, describe:



## Remove Row(s)

To delete a row that has been entered, click on a row to highlight it.

Receipts ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description ^ 1	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total ^ 2	
	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$30,000.00	

Click **Remove Row(s)** to delete the row you just selected.

Receipts ?

Edit Row Remove Row(s) Cancel Edit

Description	Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Y6 Amt		Add
Description ^ 1	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Total ^ 2	
	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$30,000.00	

When the Remove Row(s) button is clicked, the follow window will appear. To cancel the deletion, click the Cancel button. To complete the deletion, click the OK button.

Confirm

Are you sure you want to remove the selected Row(s)?

OK Cancel

## Edit Row

Editing rows in the Receipts sections works in the same fashion as does the requirements section as shown on page 20 of this document.



## ATTACHMENTS TAB

Attachments

The attachments section of the form provides the ability to attach any file to the request using the “Add Attachment” control. Files attached here may be viewed or deleted.

Basic Information Request Detail **Attachments** ←

**Attachments**

Add Attachment View Attachment Delete Attachment

Attachment Name	Attachment Type	Attachment Size	Date Uploaded ▼	Uploaded By
FCAP Report.pdf	application/pdf	96.989 KB	09/11/2014	IBIS User1
OC-25_Cost_Estimate_Resear...	application/vnd.openxmlformat...	8.883 KB	09/11/2014	IBIS User1

Attachments that have been added using a different section of the form (i.e., the OC-25 Cost Estimate and the FCAP Report) will show in the list. However, you will not be able to delete those files here. To delete attachments added to the request in another part of the form, you will need to manage the attachment from the location in the form for which it was attached.

Basic Information Request Detail **Attachments**

**Attachments**

Add Attachment View Attachment Delete Attachment

Attachment Name	Attachment Type	Attachment Size	Date Uploaded ▼	Uploaded By
FCAP Report.pdf	application/pdf	96.989 KB	09/11/2014	IBIS User1
OC-25_Cost_Estimate_Resear...	application/vnd.openxmlformat...	8.883 KB	09/11/2014	IBIS User1

## View an Attachment

To view an attachment, first click on the attachment name, and then click the “View Attachment” button.

Basic Information Request Detail **Attachments**

Attachments

Add Attachment View Attachment Delete Attachment

Attachment Name	Attachment Type	Attachment Size	Date Uploaded ▾	Uploaded By
FCAP Report.pdf	application/pdf	96.989 KB	09/11/2014	IBIS User1
OC-25_Cost_Estimate_Resear...	application/vnd.openxmlformat...	8.883 KB	09/11/2014	IBIS User1

Once clicked, you will see a message asking if you want to open or save the attachment. Click Open to open and view the attachment; or click Save to save the attachment.

Do you want to open or save **FCAP Report.pdf** from **dev.ibis.nc.gov**?

Open Save ▾ Cancel ×

## Delete an Attachment

To delete an attachment, first click on the attachment name, and then click the “Delete Attachment” button. Remember, you will not be able to delete attachments that have been added to the request in another part of the form (i.e., the OC-25 Cost Estimate and the FCAP Report) while on the Attachment tab. To delete those attachments, you will need to manage those attachments from the location in the form for which it was attached.

Basic Information Request Detail **Attachments**

Attachments

Add Attachment View Attachment Delete Attachment

Attachment Name	Attachment Type	Attachment Size	Date Uploaded ▾	Uploaded By
testing_adding_attachment.txt	text/plain	0.027 KB	09/11/2014	IBIS User1
FCAP Report.pdf	application/pdf	96.989 KB	09/11/2014	IBIS User1
OC-25_Cost_Estimate_Resear...	application/vnd.openxmlformat...	8.883 KB	09/11/2014	IBIS User1

Once you click Delete Attachment, you will be presented with a confirm message as shown below. Click “OK” to delete the attachment or “Cancel” to cancel the deletion.

